

Learning and Development Process: Stages, Roles, and Deliverables

-  Course scope: end-to-end L&D workflow, from intake to evaluation
-  One process, three lenses: stages, roles, and deliverables
-  Built for coordinators, learning designers, and team leads who share projects
-  A working checklist for real projects, not theory
-  By the end: diagnose gaps, clean up handoffs, right-size the process



Why a Defined L&D Process Matters



Ad hoc process symptoms:

rework, scope creep, late launches, duplicated content



2026 drivers: skills shortages, AI in the flow of work, skills-based strategy, impact pressure



Readiness gap: strong design and delivery, weak governance, data, and measurement credibility



Diagnose before you design:

invest only where learning is the right solution

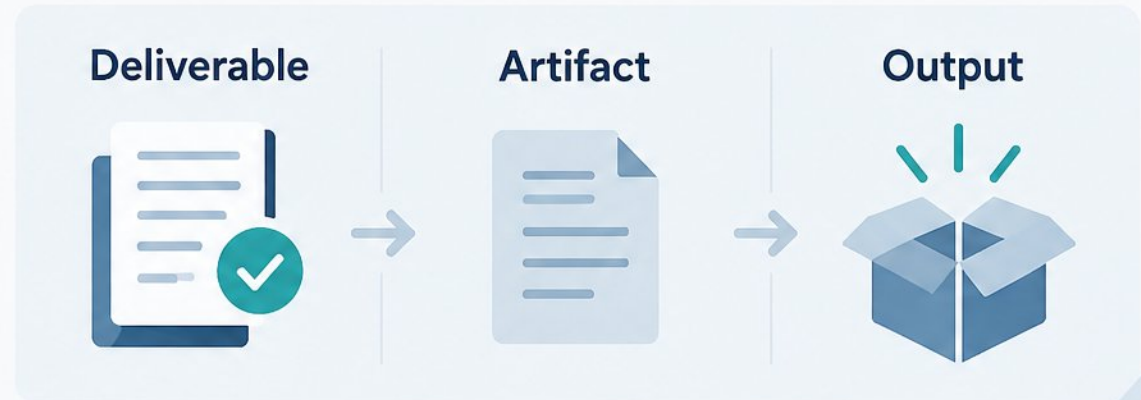
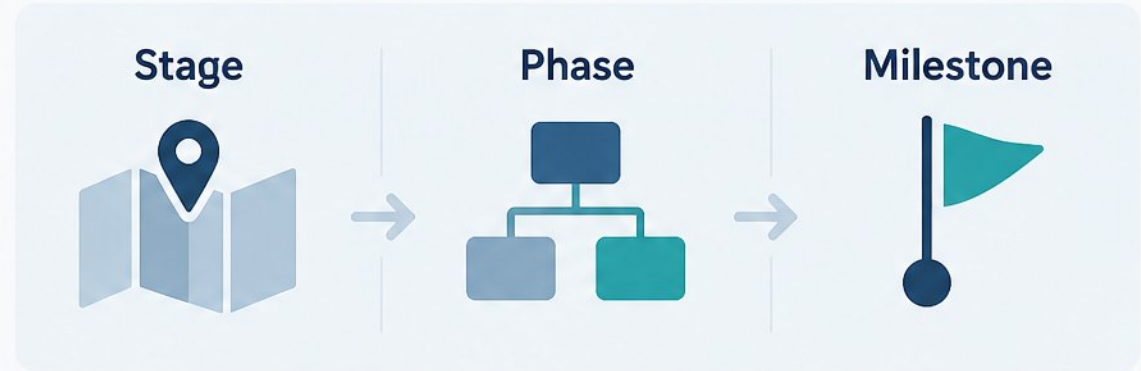


Self-check: can you name the owner and sign-off for each stage?



Core Concepts and Shared Vocabulary

- Stage = broad work period; phase = subsection; milestone = decision gate
- RACI: Responsible does the work; Accountable owns outcome and signs off
- Consulted gives input; Informed stays updated on progress
- Deliverable = named, reviewable, approved item feeding the next stage
- Shared definitions prevent handoff failures between coordinators, designers, and leads

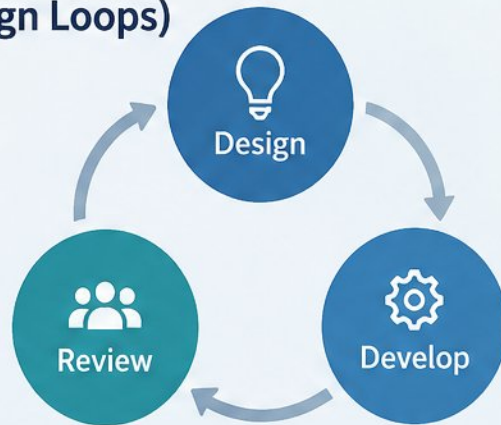


Starting Point: A Stage-Gate View of the L&D Workflow

ADDIE (Sequential Stage-Gate Process)



SAM (Iterative Design Loops)

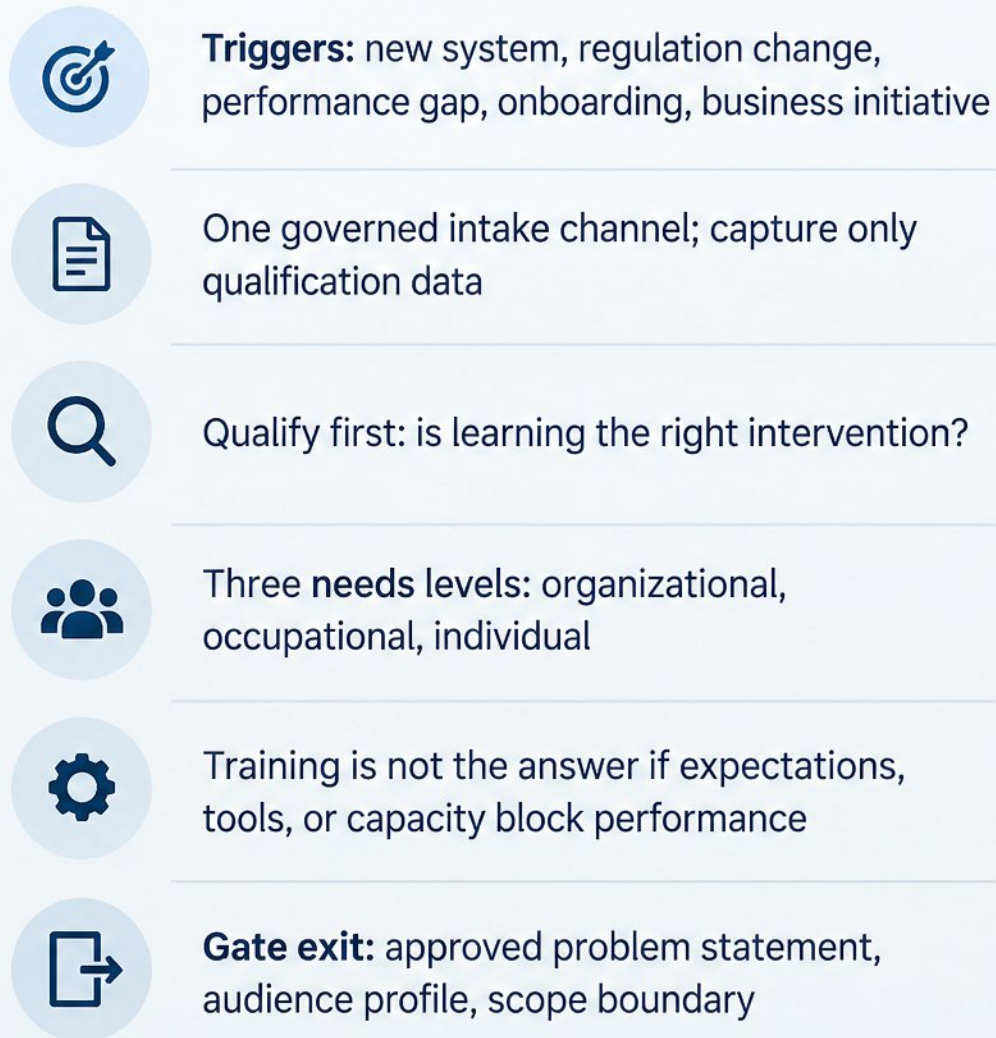


Iterative design loops for faster, prototype-driven projects.

- **ADDIE:** Analysis, Design, Development, Implementation, Evaluation — each with a gate
- Every stage has inputs, activities, a named deliverable, and an exit criterion
- **ADDIE's weakness:** linearity and summative-only evaluation; run formative checks throughout
- **SAM:** iterative design loops for faster, prototype-driven projects
- Corporate variants add intake before analysis and refresh after evaluation
- Choose sequential for compliance; iterative for fast-moving product training



Stage 1: Intake and Needs Analysis



Stage 1
Intake and Needs Analysis

Designing the Solution: Objectives, Assessment, and Design Brief



- Start at the business result, then behaviors, objectives, engagement
- Write measurable objectives with conditions and criteria
- Design assessments before content; map each objective to evidence
- Choose modality by need: e-learning, VILT/ILT, blended, performance support
- Design document: problem, audience, objectives, assessment, evaluation, sign-off
- Project plan: timeline, SME time, risks, review gates, named decision maker



Stage 3: Development and Production



Storyboard every screen: text, narration, interaction, feedback, accessibility



Storyboard sign-off is a production contract; changes cost less now



Prototype one section in final style to validate design and tracking



Alpha for content review, beta for final assets, gold for release



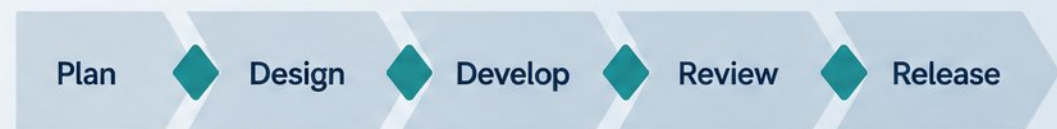
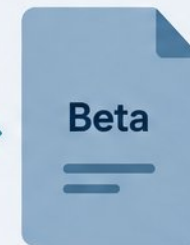
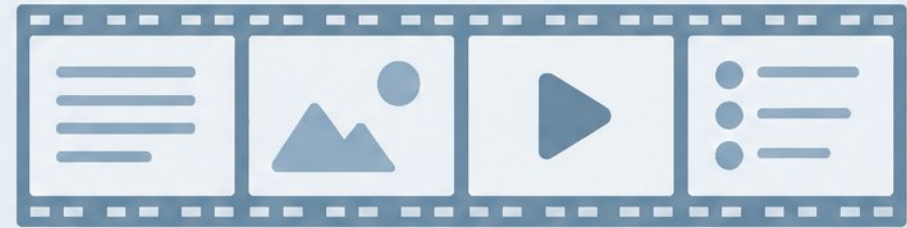
Plan two scoped review rounds with deadlines; open cycles cause overruns



QA accessibility and test the published package in the real LMS



Choose build vs. buy and tools by objective, not habit



Stage 4: Implementation and Delivery



- Pilot with a small representative group before full rollout



- Readiness checklist: content QA, LMS test, accounts, comms, facilitator training



- Plan delivery logistics: scheduling, enrollment rules, reminders, completion tracking



- Enable managers and facilitators before launch—strongest predictor of sustained gains



- Define contingencies: platform failure, late SMEs, audience unavailability

READY TO LAUNCH



Plan

Design

Develop

Implement
and Deliver

Sustain

Stage 5: Evaluation and Continuous Improvement



Plan evaluation at design;
start with Level 4, work backward



Four levels as signals:
relevance, capability, behavior, results



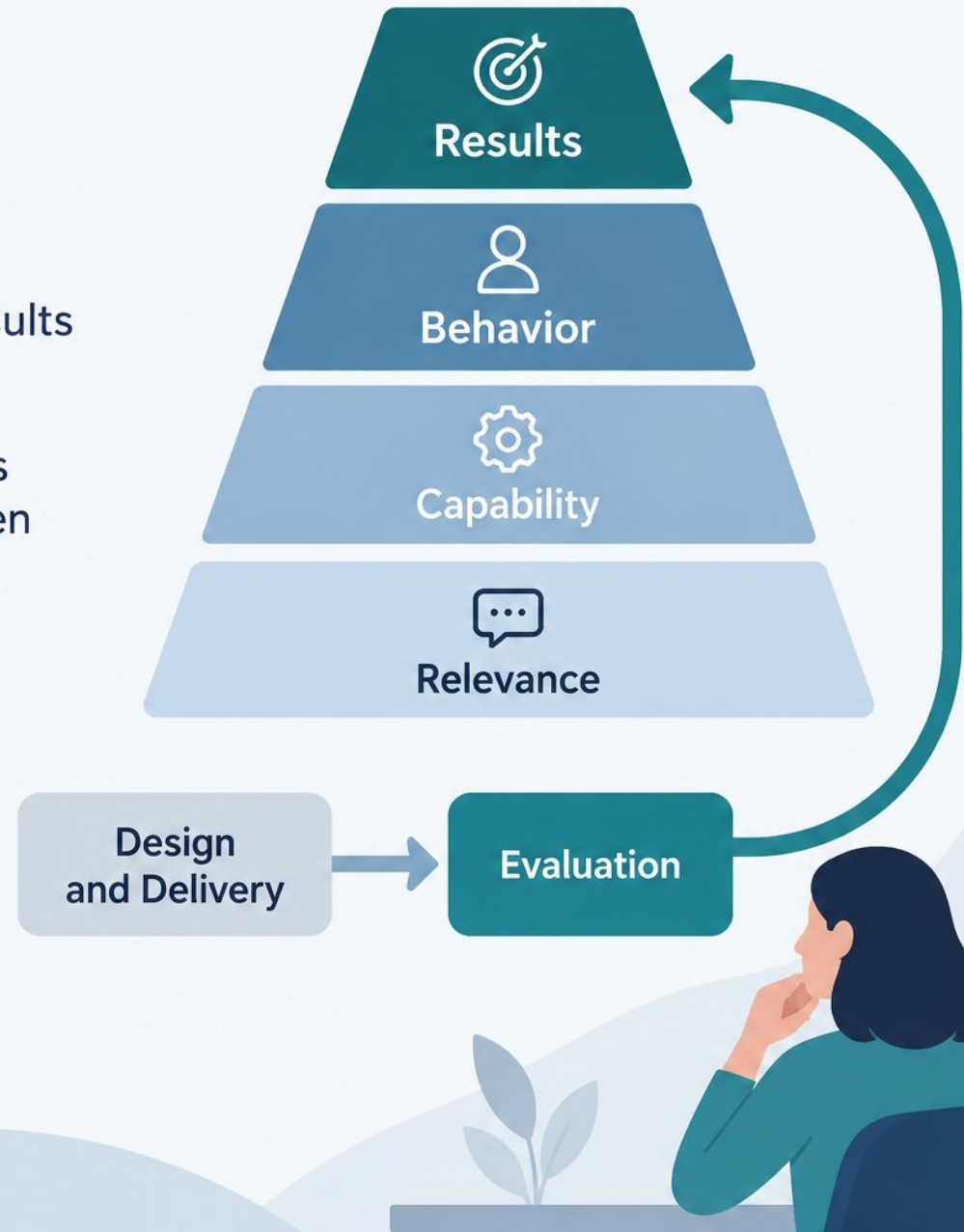
Performance environment shapes
transfer; diagnose the system when
behavior stalls



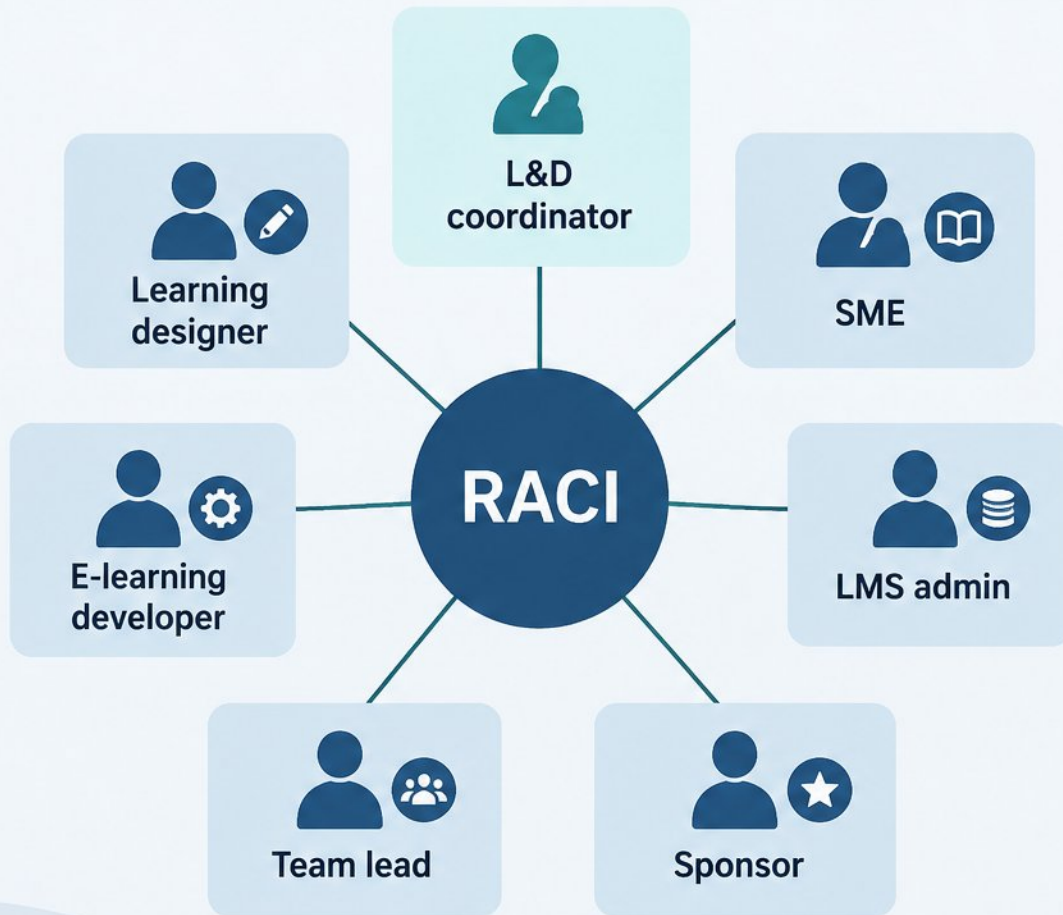
Triangulate surveys, skill demos,
manager observation, and
business data



Close the loop: update content,
schedule review, document
lessons learned



Roles, Responsibilities, and the RACI View



Core roles: L&D coordinator, learning designer, SME, e-learning developer, LMS admin, team lead, sponsor



L&D manager is accountable across the program; designer owns design, storyboard, and evaluation framework



SME is consulted, reviews accuracy, and time is front-loaded in analysis through development



Sponsor signs off at gates: needs analysis, design review, budget, and Level 4 metric



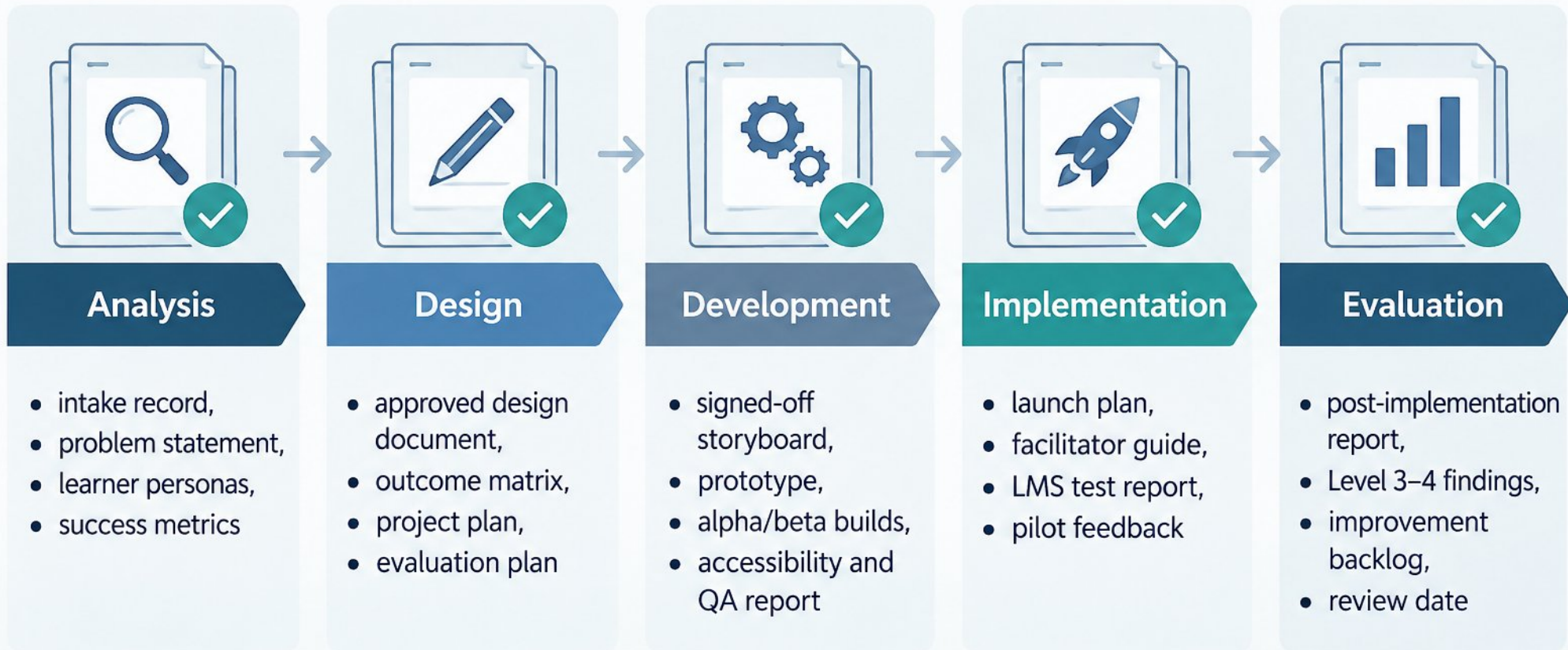
One accountable person per deliverable; unresolved reviewer conflicts are resolved between reviewers



Common failures: skipping the designer, building straight from SME content, unclear Level 3/4 ownership

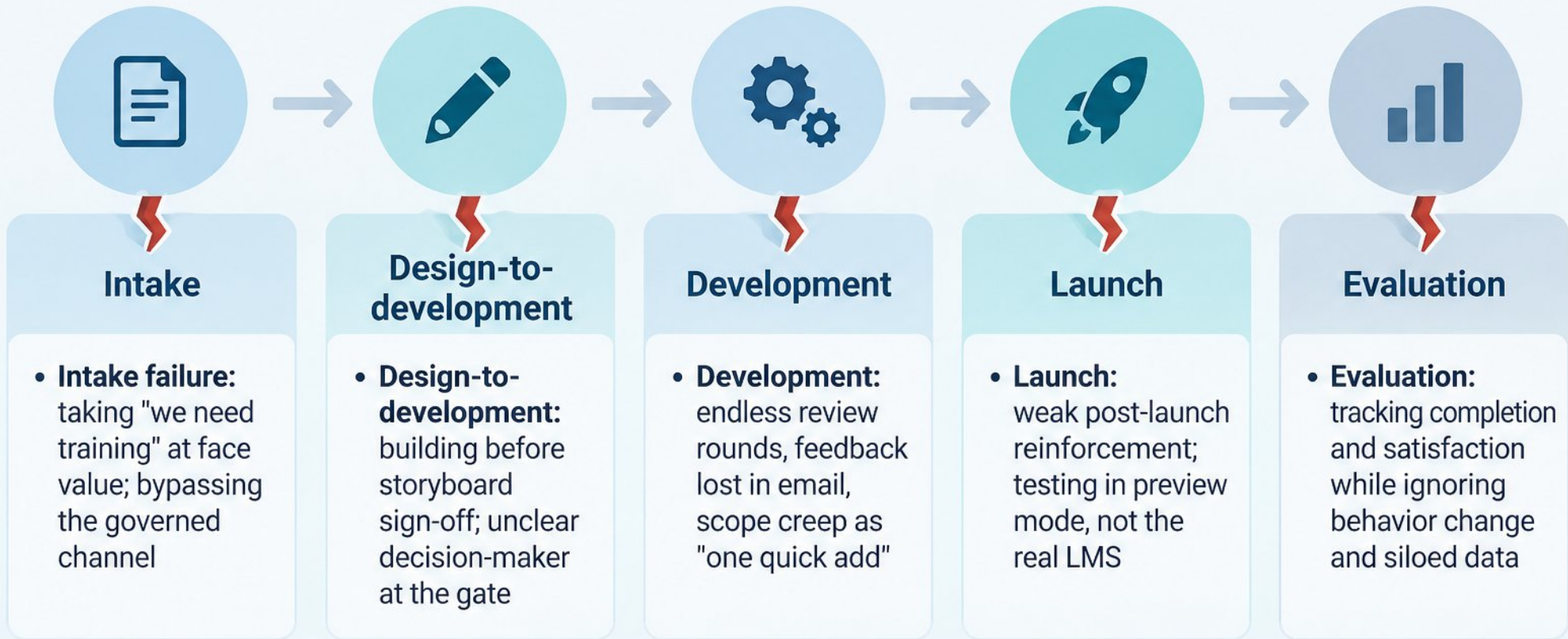


Deliverables Map: What Must Exist at Each Stage



Quality rule: every deliverable traces to an objective and is signed off before its gate.

Handoffs and Failure Modes: Where L&D Processes Break



Prevention:

adopt one clear rule per failure mode this quarter

Scaling the Process: Small Projects vs. Large Programs

- Most L&D teams are small; roles often collapse into one person
- Lightweight path: one-page brief, written storyboard, two review rounds, small pilot
- Full path for governed programs: RACI tracker, sponsor gates, formal QA, Level 3–4 owners
- Adapt by risk, not habit: compliance work earns more formality than a module update
- Keep deliverables constant, vary their depth: brief, design, build review, launch check, evaluation

Lightweight Path

One-page brief, written storyboard, two review rounds, small pilot.



Full Path for Governed Programs

RACI tracker, sponsor gates, formal QA, Level 3–4 owners.



Adapt by risk, not habit: compliance work earns more formality than a module update.

Keep deliverables constant, vary their depth: brief, design, build review, launch check, evaluation.

Your One-Page Process Checklist and Next Steps



Checklist spans kickoff, analysis, design and storyboard, development, evaluation



Adopt this week: name the accountable role for each stage



Identify one missing deliverable on a live project



Choose your success measure before launch—can the number move?



Document lessons learned, schedule review, keep the course from going stale



Take-aways: RACI matrix, design template, deliverables map, this checklist



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